

December 27, 2007

Cari Trussell  
Employee Relations Specialist  
Washington Public Employees Association  
18820 Aurora N. Suite 202  
Shoreline, WA 98133

RE: Nora Downard v. Olympic College  
Allocation Review No. ALLO-07-009

Dear Ms. Trussell:

The Director's review of Olympic College's (OC) allocation determination of Nora Downard's position has been completed. The review was based on written documentation and on information provided during the December 18, 2007 Director's review conference call. Present during the conference call were you; Ms. Downard, Dianna Larsen, Dean of Enrollment Services and Registrar; and Jacquie Curry, Human Resource Consultant.

**Background**

Ms. Downard requested reallocation of her Program Assistant position to the Program Coordinator classification. By letter dated January 12, 2006, OC determined that Ms. Downard's position should be reallocated to the Secretary Senior classification. On February 12, 2006, Ms. Downard requested a Director's review of OC's determination.

During the Director's review meeting, I noted that some of the exhibits provided by Ms. Downard were dated after her request for reallocation and therefore, were outside of the period relevant to the review of her position. Furthermore, the activities represented in these exhibits were performed after OC's review of her position. I indicated that even though those documents were outside the time frame of this review, they were included as part of the record of this case, and I would give them the appropriate weight. Also during the review meeting, I requested a copy of the organizational chart for Enrollment Services reflective of the organization as it existed in August 2006. Subsequent to the conference call, Dean Larsen provided a copy of the organizational chart.

### **Summary of Ms. Downard's Perspective**

Ms. Downard argues that she provides program support to the Dean of Enrollment Services for all activities including Financial Aid, International and Community Outreach, Admissions, and Records and Registration. Ms. Downard contends that she acts as the program liaison and resource person by coordinating program services and resources within the department and with staff and organizations outside of the department. Ms. Downard asserts that she has extensive contacts with and explains program policies and procedures and state-level rules and regulations as well as federal regulations to college staff and faculty, members of the public, representatives of outside entities' such as the Puget Sound Naval Shipyard apprenticeship programs and the plumbers apprentice program, international agents who recruit students for the College, representatives from businesses, and military recruiters.

Ms. Downard argues that she attends meetings and provides information as the program representative and she prepares and edits reports, correspondence, and materials such as flyers and advertising materials, using knowledge and experience specific to the program. She contends she performs complex scheduling, independently prioritizes work to meet the needs of the program, provides training and instruction on program specific subjects such as the use of the Instructor Briefcase, and anticipates, identifies and resolves problems specific to the program.

In addition, Ms. Downard contends that she is responsible for monitoring the twelve budgets managed by the Dean of Enrollment Services. During the Director's review meeting, Ms. Downard explained that she prints monthly budget reports and reviews them with the Dean and she produces the end-of-the year reports that include the roll-over information for remaining funds. These reports are forwarded to Financial Services for development of the upcoming year's budgets.

### **Summary of Olympic College's Reasoning**

OC acknowledges that some of Ms. Downard's duties appear to fit within the program classifications but asserts that the majority of her duties are performed at the direction of the Dean rather than independently in support of the program. OC contends that while the Dean may delegate budget monitoring and purchasing to Ms. Downard, the Dean maintains ultimate authority for budget expenditures and oversight of purchases as typified in the secretarial classifications. OC further contends that Ms. Downard's work with outside entities and international agents is performed under the direction of the Dean. OC argues that providing information on Enrollment Services' activities is not unique to Ms. Downard's position but is performed by all levels of staff within the division. OC asserts that the primary function of Ms. Downard's position is to provide assistance to the Dean which is best described by the Secretary Senior classification.

### **Director's Determination**

As the Director's designee, I carefully reviewed all of the documentation in the file and the information Ms. Downard and OC provided during the Director's review meeting. Based on my review of the documents, the information provided during the review meeting, the available classifications, and my analysis of Ms. Downard's overall duties and responsibilities, I conclude that her position should be reallocated to the Program Coordinator classification.

### **Rationale for Determination**

The purpose of a position review is to determine which classification best describes the overall duties and responsibilities of a position. A position review is neither a measurement of the volume of work performed, nor an evaluation of the expertise with which that work is performed. A position review is a comparison of the duties and responsibilities of a particular position to the available classification specifications. This review results in a determination of the class that best describes the overall duties and responsibilities of the position. See Liddle-Stamper v. Washington State University, PAB Case No. 3722-A2 (1994).

During the Director's review meeting, Ms. Downard and Dean Larsen emphasized the extent of liaison and coordination functions that Ms. Downard performs in support of Enrollment Services and the activities of the program. Dean Larsen relies on Ms. Downard to perform her duties independent of the day-to-day operations of the six departments located within Enrollment Services. Ms. Downard reports directly to Dean Larsen while the other areas that report to Ms. Larsen do so through the supervisor, the director or the Associate Dean for the area.

Dean Larsen relies on Ms. Downard to act as the program resource for surveys, to coordinate work as needed between various department staff, to promote campus programs with outside organizations, and to be the primary resource person for faculty utilizing the Instructor Briefcase. In addition, Dean Larsen relies on Ms. Downard to monitor the various budgets, initiate corrections as needed and to advise her of the status of the budgets and any corrections made. In resolving budget errors, Ms. Downard gathers information, creates a paper trail and consults with department staff and Dean Larsen. Once the error is resolved, Ms. Downard forwards the correction to the fiscal office where the changes are made to the appropriate budgets.

Dean Larsen has delegated responsibility for identifying and contacting students on probation or deficiency status to Ms. Downard and the Program Support Supervisor and she relies on them for quality control of the information and reports for all levels of probationary status. Dean Larsen clarified that she retains authority for students who have been suspended but she has delegated authority to Ms. Downard and the Program Support Supervisor for students on lower levels of probationary status.

Dean Larsen explained that she is the supervisor of record for work study students within enrollment services but she depends on Ms. Downard and the Program Support Supervisor to provide day-to-day direction to the student workers. In addition, she relies on Ms. Downard to provide day-to-day direction to the switchboard operator.

The class series concept for the secretarial classes states:

Positions in this category provide a variety of clerical services and/or secretarial duties in support of a work unit, department, supervisor(s), staff members, and/or general day-to-day office operations. Services provided and duties performed include functions such as the creation, storage, retrieval, mailing, and posting of documents, data, and records, providing assistance to others in direct support of the work, providing information to others about services available, assisting customers with access to services, updating web sites, preparing typed documents, screening calls and visitors, making travel arrangements, scheduling meetings

and/or classes, taking notes and transcribing minutes, keeping supervisor's and/or staff member's calendar(s) and committing supervisor's and/or staff member's time.

Positions in this category operate office equipment such as computers, word processors, typewriters, calculators and copy machines. Positions may operate word processing equipment a majority of the time and/or operate data entry equipment such as remote terminals, computers, sorters, interpreters, optical readers and scanners to input, retrieve, sort, and interpret data.

Secretarial positions differ from Clerical, Office Support positions in that the primary focus of Secretarial positions is to provide secretarial services and assistance to one or more individuals. Secretarial positions typically facilitate the supervisor's and staff members own work, relieve the supervisor and/or staff members of day-to-day clerical details, apply knowledge of supervisor's work commitments including status of projects and nature of contacts, and commit supervisor's time.

Most positions within the civil service system occasionally perform duties that appear in more than one classification. However, when determining the appropriate classification for a specific position, the duties and responsibilities of that position must be considered in their entirety and the position must be allocated to the classification that provides the best fit overall for the majority of the position's duties and responsibilities. See Dudley v. Dept. of Labor and Industries, PRB Case No. R-ALLO-07-007 (2007).

Some of Ms. Downard's duties are secretarial in nature and fit within this class series concept. However, Ms. Downard's duties are performed in support of a specific program using knowledge and experience unique to that program. In addition, Ms. Downard's extensive contacts with program participants and outside entities go beyond providing assistance in direct support of work, providing information about services or assisting them with access to services. Rather, Ms. Downard is providing information that requires interpreting and applying policies, rules and regulations in program specific areas such as determining the probationary or deficiency status of students, transferring expenses between budget accounts, issuing agent contracts, and providing instruction to faculty in the use of the Instructor Briefcase computer program.

The definition of the Secretary Senior classification states:

Perform complex secretarial duties such as independently planning, organizing and prioritizing work, monitoring and evaluating budget(s) status and initiating corrections, developing travel itineraries, compiling reports, studies, and/or applications, developing, modifying, and/or maintaining data base management, office record keeping, or filing system(s), establishing office procedures, standards, priorities, and deadlines, and coordinating office operations. Positions initiate action to ensure work unit and/or office goals are met and have frequent contacts with clients, the public, staff members from other departments, students, and faculty.

Assignments and projects are of a complex nature. Independent performance of complex secretarial assignments requires substantive knowledge of a variety of regulations, rules, policies, procedures, processes, materials, or equipment. Problems are resolved by choosing from established procedures and/or devising work methods. Guidance is available for new or unusual situations. Deviation from established parameters requires approval. Work is periodically reviewed to verify compliance with established policies and procedures.

As stated above, some of Ms. Downard's duties are secretarial in nature. These duties are performed in support of specialized program tasks and undertakings. The Secretary Senior classification encompasses the complexity of some of her duties and also the independence she exercises in the performance of her work. However, this classification does not address the program specific aspects of Ms. Downard's duties, the program unique knowledge and experience she utilizes in the performance of her duties, or the extent of her program specific contacts with clients, the public, faculty, and outside entities, including international agents. The Secretary Senior classification does not address the position purpose, as described in the position review request form, or the overall scope and breadth of impact of Ms. Downard's duties and responsibilities.

The Department of Personnel Glossary of classification terms defines a program as:

A specialized area, which has specific complex components and discrete tasks that distinguish it from other programs (or the main body of an organization). A program is specific to a particular subject and has a specific mission, goals, and objectives. A program typically has an identifiable funding source and separate budget code.

The specific components and discrete, specialized tasks involve interpretation of policies, procedures and regulations, budget coordination/administration, independent functioning, and typically, public contact relating specifically to program subject matter, clients and participants.

Duties are not of a general support nature transferable from one program to another. Performance of clerical duties is in support of incumbent's performance of specialized tasks. Independent performance of the specialized tasks usually requires a training period of not less than six months.

Enrollment Services meets the definition of a program.

The class series concept for the program classifications states:

Perform work requiring knowledge and experience that is specific to a program. Organize and perform work related to program operations independent of the daily administrative office needs of the supervisor. Represent the program to clients, participants and/or members of the public.

A program is a specialized area with specific complex components and discrete tasks which distinguish it from the main body of an organization. A program is specific to a particular subject. The specialized tasks involve interpretation of

policies, procedures and regulations, budget coordination/administration, independent functioning and typically, public contact. Duties are not of a general support nature transferable from one program to another. Performance of clerical duties is in support of incumbent's performance of specialized tasks.

Ms. Downard's position fits within the class series concept for the program classifications.

The basic function of the Program Coordinator classification states: "[c]oordinate the operation of a specialized or technical program."

The distinguishing characteristics for the Program Coordinator classification state:

Under general direction, perform work using knowledge and experience specific to the program. Exercise independent judgment in interpreting and applying rules and regulations. Independently advise students, staff, program participants and/or the public regarding program content, policies, procedures and activities; select/recommend alternative courses of action and either:

(1) project, monitor, maintain, initiate and/or approve expenditures on program budgets

OR

(2) have extensive involvement with students, staff, the public and/or agencies in carrying out program activities, and coordinate, schedule and monitor program activities to determine consistency with program goals.

The Department of Personnel Glossary of classification terms defines a working under general direction as:

Work assignments are carried out in accordance with established policies and objections. Position incumbents plan and organize the work, determine the work methods to be employed, and assist in determining priorities and deadlines. Completed work is reviewed in terms of effectiveness in producing expected results.

Acting as the liaison for the Dean, Ms. Downard coordinates the operation of the program using knowledge and experience specific to Enrollment Services. Ms. Downard works under the general direction of Dean Larsen. She exercises independent judgment; independently advises students and staff; monitors and initiates corrections to budgets; exercises delegated purchasing authority for up to \$500 per purchase; and has extensive contacts with the public and outside agencies. Ms. Downard's position fits within the distinguishing characteristics of the Program Coordinator classification.

While some of Ms. Downard's duties are found in the Secretary Senior classification, these duties are performed in support of a program. The Program Coordinator classification best encompasses the scope of her work and the majority of her overall duties and level of responsibility. Ms. Downard's position should be reallocated to the Program Coordinator classification.

**Appeal Rights**

Because this position is covered by a Collective Bargaining Agreement, please refer to the contract to determine whether the parties have appeal rights to the Personnel Resources Board.

If no further action is taken, the Director's determination becomes final.

Sincerely,

Holly Platz, SPHR  
Director's Review Investigator

cc: Nora Downard  
Jacquie Curry, Olympic College  
Lisa Skriletz, DOP